

**Actuarial & Employer Services Branch**

P.O. Box 942709

Sacramento, CA 94229-2709

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Reply to: AESB Member Transactions Unit

ELECTION OF OPTIONAL MEMBERSHIP - STATE APPOINTEE

California Government Code Section 20320 provides that a person directly appointed by the Governor, without the nomination of any officer or board, or an officer or an employee directly appointed by the Attorney General, Lieutenant Governor, Controller, Secretary of State, Treasurer, or Superintendent of Public Instruction exempt from civil service under Article VII of the California Constitution, except those appointed pursuant to subdivision (i) of Section 4 thereof, is excluded from membership in the California Public Employees' Retirement System (CalPERS) unless he or she files with the Board of Administration an election in writing to become a member. Government Code Section 20321 provides that persons appointed to the office of the Adjutant General or Assistant Adjutant General after October 1, 1961, shall have rights to membership in CalPERS and shall have no rights under the retirement benefit provisions of the Military and Veterans Code, except that persons entitled to retirement benefits under the Military and Veterans Code appointed to the office of the Adjutant General or Assistant Adjutant General shall continue to receive military retirement benefits during their term of office.

The election of optional membership may be filed at any time while a compensated appointee holds the appointed office and the office is not otherwise excluded by law. Once elected, the membership remains in effect for all future service in the appointed position with the same employer unless there is a significant break in employment. It may be terminated only upon permanent separation from employment covered by CalPERS and subsequent withdrawal of retirement contributions. While a CalPERS member, you may contribute and receive credit for any previous eligible service in the appointed position. The Member Services Division, P.O. Box 942704, Sacramento, CA 94229-2704, will handle any such request to purchase previous service. The form to request optional member arrears service is on the CalPERS website at www.calpers.ca.gov, or you may request the "CalPERS Service Credit Purchase Options" booklet from your employer, in which a copy of the "Optional Member Service" form (PERS-MSD-372) is included.

If your election for optional membership in CalPERS will result in concurrent service with employment credited in a private benefit plan or another public retirement system, please contact that organization for information regarding the impact of such concurrent service. If your election will result in concurrent service under CalPERS, please contact the Member Transactions Unit, Actuarial & Employer Services Division, at the above phone number, before completing this election form.

Board/commission/committee positions "with nomination" are not eligible for optional membership but qualify under standard membership eligibility under Government Code section 20305. Refer to the Public Employees' Retirement Law and the State Handbook for further information on State appointees. Any questions on membership eligibility may be directed to the Member Transactions Unit, Actuarial & Employer Services Division, at the above phone number.

PLEASE COMPLETE AND RETURN THIS ENTIRE FORM TO YOUR PERSONNEL OFFICE SO THEY CAN ESTABLISH YOUR MEMBERSHIP.

I AM AN APPOINTED OFFICER AS DEFINED IN PARAGRAPH 1 ABOVE, being the (Officer title) _____ of the (Agency name) _____ (Agency contact & phone) _____. My present term will expire on _____, 20____. In accordance with the provisions of Government Code sections 20320 or 20321, **I ELECT TO BECOME A MEMBER OF CALPERS.** I request that this election be filed with the Board of Administration of the California Public Employees' Retirement System (CalPERS). **I UNDERSTAND THIS ELECTION IS IRREVOCABLE AS LONG AS I REMAIN IN EMPLOYMENT AS A MEMBER.**

(Printed Name in FULL)

(Signature)

(Date)

(Social Security Number)

(Address)

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(Daytime Telephone Number)

(City & State)

(ZIP Code)

INFORMATION PRACTICES STATEMENT

The Information Practices Act of 1977 and the Federal Privacy Act require the California Public Employees' Retirement System (CalPERS) to provide the following information to individuals who are asked to supply information. The information requested is collected pursuant to the Government Code (Sections 20000, et seq.) and will be used for administration of the Board's duties under the Retirement Law, the Social Security Act, and the Public Employees' Medical and Hospital Care Act, as the case may be. Submission of the requested information is mandatory. Failure to supply the information may result in the System being unable to perform its function regarding your status. Portions of this information may be transferred to: State and public agency employers, California State Attorney General, Office of the State Controller, Teale Data Center, Franchise Tax Board, Internal Revenue Service, Workers' Compensation Appeals Board, State Compensation Insurance Fund, County District Attorneys, Social Security Administration, beneficiaries of deceased members, physicians, insurance carriers, and various vendors who prepare the microfiche/microfilm for CalPERS. Disclosure to the aforementioned entities is done in strict accordance with current statutes regarding confidentiality.

You have the right to review your membership file maintained by the System. For questions concerning your rights under the Information Practices Act of 1977, please contact the Information Coordinator, CalPERS, 400 Q Street, P.O. Box 942702, Sacramento, California 94229-2702.